

Circulation Users Meeting Notes

June 9, 2009

Libraries in attendance: Acushnet, Attleboro, Berkley, Bridgewater, Dartmouth, Dighton, East Bridgewater, Easton, Fairhaven, Foxboro, Hanson, Lakeville, Mansfield, Marion, Middleborough, New Bedford, New Bedford High, North Attleboro, Pembroke, Plainville, Plympton, Rehoboth, Rochester, Seekonk, Somerset, Swansea, Taunton, West Bridgewater

Online patron registration

Laurie demonstrated the new online patron registration feature. This has been in testing by Lakeville and was approved for usage by the directors at the May Membership meeting. There will be a link from the iBistro login screen that will provide a form for a person to get a temporary barcode and registration record. The record will be created on the SAILS system and the barcode will allow the patron to place holds. The prefix of the barcode is 2043 and is only used by SAILS. The patron record is created with a patron profile of OUREG. The system does not do any duplicate checking. The record is only good for 21 days and will be purged after 30 days if the patron does not come to the library to get his/her card. Detailed directions will be emailed to the circulation list by June 12. The online registration form will be live on June 22.

Online staff training – Bob did a demonstration of the new webinar service that SAILS will be using to conduct training and to offer recorded training sessions. More information about this will be available as course material is developed.

In transit items for book club holds – please remember not to leave items coming to your library for book club holds with a current location of intransit. Items must be checked in. You can modify the hold pickup date so the holds don't expire before the book club members come to get the materials.

The Black Belt Librarian – Ellen Casaccio – See attached.

Update on Overdrive – new policies, new titles, etc.

If a patron logs into Overdrive they can rate titles.

Patrons can select either a 7 day or 14 day loan period at the time of check out

Overdrive is about to release a new feature to allow iPod users who have Windows computers to use WMA titles as well as MP3 titles (the bulk of our collection and most popular titles are still only available in WMA.)

Release 3.3 – circulation features (see attached) ***For those in attendance we did get clarification on the expire available hold date and unfortunately it still doesn't look at the library calendar but it won't let holds expire on a day the library is closed.. I was confusing what I was told it would do with the documentation. The release is coming out July 2009 but SAILS will not install it until the fall – date still yet to be determined.

Roundtable volunteers (dates and times to be set later)

Attleboro, Lakeville, Dartmouth, New Bedford, West Bridgewater, Somerset, Seekonk.

Other questions

There have been some staff abuse of the ability to override no holds allowed messages. Starting June 10, the SAILS override will no longer allow staff to place holds on non-holdable items. Staff supervisors should contact SAILS if they need to place a hold on non-holdable items and we will give them the override code but we ask that it not be made generally available.

Taunton Public Library has been testing the ability to only view public library patron records in patron display. Attleboro, Seekonk, Dartmouth, Norfolk and West Bridgewater have volunteered to test it some more.

There was discussion about out of state cards. The network minimum fee for out of state cards is \$55. Some libraries have chosen not to issue cards to out of state residents (permanent residents not summer visitors) while others have issued cards that are only good at their library and can't be used to place holds on other libraries' materials.

A reminder to check the hold shelf for items left in transit.

How to Handle Security/Patron Problems in your Library

Highlights from MLA Speaker Warren Graham, Black Belt Librarian

It's all about Communication

Lay the groundwork by acknowledging patrons when they walk in or, when you're walking through a room, give a nod or a smile. That way, if you need to speak to them about a behavior later, you will have already had a pleasant interaction with them.

Acknowledgement is especially important for dealing with teens in the library. Many librarians expect bad behavior from them and may avoid eye contact, or only speak to them to correct their behavior.

Reminder: avoid "loose talk" about patrons. That patron might not be there, but other patrons may know that patron, or may take offense at what the staff member is saying.

Keep it Simple

One library rule can cover almost any situation: **"Any behavior that is disruptive to library use is not allowed."**
(Disruptive to other patrons and staff)

Then decide (with your director) what those behaviors are for your library, e.g.,

- Talking on cell phones
- Sleeping
- Talking in a loud voice
- Swearing
- Eating or drinking in the library, etc.
- Excessive body odor (when the smell is strong enough to clear out a room)

Judge a person by their behavior, not by how they look, i.e., enforce the same rules for the guy in the suit and tie as for a homeless person. **Appearances mean nothing.**

Be consistent. Enforce the rules for everyone at all times.

If anyone is obviously drunk (slurring their words or stumbling around) or high, call 911 immediately.

Don't hesitate to call the police. Library staff very often don't want to make a fuss, or "bother" the police, and they let a bad situation go on too long, making it more dangerous for themselves and for other patrons.

(over)

How to Tell a Patron "No"

Be "confidently cautious" when advising a patron as to what's not allowed. The majority of patrons will comply.

Don't apologize: "I'm sorry, but we don't allow cell phone use in the library."

Apologizing seems to lead to more arguing from the patron.

Instead say, "I know you didn't see the sign", or "I know you didn't know the rule", "but ____ is not allowed in the library."

Tell them, thank them, then move on. Don't stand there waiting for them to comply. However, **never say no to a patron and then immediately turn your back on them.** Try to move away in such a way that you can keep them in the corner of your eye.

Start off nice, and then get tougher if you have to.

Keep a barrier, e.g., a desk, book cart, the Circulation desk, between you and the patron if at all possible. This is a good idea any time you have to tell a patron anything unpleasant, but is especially important if you suspect they are unstable or high. If a patron is arguing and making a scene at the Circulation Desk, keep the desk between you and the patron, and if they won't accept what you're saying, call the police.

Never argue with a patron; if they are arguing with you then it falls under the category of "disruptive behavior," which is banned in the library.

Don't get drawn into an argument surrounding bias. e.g., "you're just saying that to me because I'm young, old, short, black, a woman, homeless, etc." Just repeat your request, and move on. Or if they don't comply, or continue to argue, call the police.

Never touch a patron, even to wake them up. If someone is sleeping, approach them (keeping some distance from them) and ask, "Are you OK?" "Do you need some assistance?" If their head is down on a desk, knock lightly on the desk. If they won't wake up, call the police. They may be ill and need help.

Never go outside with a behavior problem. Don't go beyond the front door. You can look out the front door to see which way they're running, but don't go after them.

Quiet Awareness

Practice quiet awareness using the 30/30/30 rule. Every 30 minutes, stop and look around you for about 30 seconds. Do this for 30 days, and it will become a habit. Your best defense is awareness.

From: Sails Business [sailsbusiness@sailsinc.org]
Sent: Tuesday, June 09, 2009 3:45 PM
To: 'dconrad@sailsinc.org'
Subject: Release 3.3

Release 3.3 – Updates and Changes

Option to Display Dates in Textual Format

An enhancement is planned to provide the option to show date displays in a textual format on receipts and in public access displays. Dates in SirsiDynix Symphony currently display only as numbers, in MM/DD/YYYY or DD/MM/YYYY format. Although various countries typically use single date formats, end users are regularly confused about due dates because so many software products do not conform to single dates. This enhancement will give sites the option to display dates explicitly as “December 10, 2007” or “12 October 2007” instead of using numbers to indicate dates.

Named Station Already in Use Message Has Been Updated

Previously, an attempt to connect via the WorkFlows Java client with a named station that was already in use would give the message

COMMUNICATION ERROR

This has been changed. Now, when a named station is already in use and another user tries to log in as that named station, the message reads

Too many tries of login

This message might also appear when the limit of simultaneous logins, defined in the WorkFlows Java client User Access, has been reached.

Transit Information Added to Circ Info Tab

In the Item Search and Display wizard, the Circ Info tab that displays on the Call Number/Item tab now displays transit information about the item. Under the heading “Transit,” the following transit information displays.

- To — The library to which the item was sent
- From — The library from which the item was sent
- Reason — The reason for the transit
- Date Sent — The date the item was placed in transit

Also, the summary circulation information on this tab, such as total bills, comments, and orders, now displays under the heading “Counters.”

New Circulation Sets Feature

The new Circulation Sets feature allows users to group individual items together to circulate as one set of items.

New Circulation Sets Wizards

The Circulation Sets feature includes new wizards for creating, displaying, maintaining, and removing circulation sets.

The Circulation Sets feature includes the following wizards. These wizards are found in the Maintain Sets group on the Circulation toolbar.

- Add Circulation Sets — This wizard is used to create a circulation set.
- Display Circulation Sets — This wizard is used to display a list of all items contained in a circulation set. If you type a set ID, all the items belonging to the set display.
- Modify Circulation Sets — This wizard is used to change the makeup of a circulation set.
- Remove Circulation Sets — This wizard is used to remove a circulation set.

Circulation Sets Designations

Users can identify the circulation sets as parental or non-parental.

- Parental — A parental circulation set has a separate bibliographic and item record designated as the parent item. When items circulate as part of a parent circulation set, the items are circulated using the same loan period and circulation rule as the parent item.
- Non-parental — A non-parental circulation set does not have a separate bibliographic and item record designated as the parent item. The intent of the non-parental circulation set is to provide a vehicle for bulk processing within the Circulation module. Each item in a non-parental circulation set will circulate using its own circulation rule.

Creating and Maintaining Circulation Sets

When creating and maintaining circulation sets, users need to keep in mind the following:

- Users must group together at least two Item IDs to make a set. As items are added to the set, the Total Parts in Set counter will update with the number of items in the set.
- For each type of circulation set there is a set ID. For parent type circulation sets, the ID of the parent item is the set ID; for non-parental type circulation sets, the set ID is the ID assigned to the set.
- When creating circulation sets, if the user selects the Circulate as Set option, items within the set cannot circulate individually; they can only circulate as part of the set. If the Circulate as Set option is not selected, then items within the set can individually circulate.
- An item cannot belong to more than one circulation set. When a set is created or an item is added to a set, the system will check to see if the item already belongs to a set, and if so, prevent the item from being added to the new set.

Circulation Sets and the Circulation Wizards

Circulation sets can be checked out, checked in, renewed, transited, and more using the standard circulation and offline circulation wizards.

- Checkout — Users can check out circulation sets using the Checkout wizard.

When a parent type circulation set is checked out, the system checks out the parent item and each of the child items using the circulation map for the parent item (the parent will not circulate on its own). When a non-parent type circulation set is checked out, the system checks out the items associated with the set using the individual items' circulation rule.

The control record can indicate whether or not items within a set can be checked out individually. If not, the wizard displays a message indicating that the item can only circulate as part of a circulation set and includes the set ID in the message.

When the user scans the item ID of circulation set item that can circulate individually, the Checkout wizard will display a message indicating that the item is part of a circulation set. The user can select to continue with the individual item check out or cancel the check out.

The Checkout wizard has a new behavior property, Checkout All Items Associated with a Set, which allows the user to checkout all items at once, or prompts the user to select items for checkout.

New User Name Fields

In Version 3.3, the user name has been expanded to include the following new fields:

- First name (maximum 20 characters)
- Preferred name (maximum 20 characters)
- Middle name (maximum 20 characters)
- Last Name (maximum 60 characters)

- Suffix (maximum 10 characters)

User Search and the User Search helper have been modified to search on the data in any of these name fields (except for Suffix). Wizards, tabs, and helpers have been modified to display the new fields, and user load reports and programs have also been updated.

When sites upgrade to Version 3.3, these new user fields will be added to the user records. The User Name field will be renamed “Last Name,” and the previous user name data will populate this new Last Name field. After the Version 3.3 upgrade, sites will need to run the new Refactor User Name report which will convert the user name data in the Last Name field and populate the new First Name, Middle Name, and Suffix fields. (The Preferred Name field will not be populated because it is a brand new field for SirsiDynix Symphony.)

Fine Payment Receipts Subtotal by Fine Type

An enhancement is planned to allow an option on fine payment receipts to show payment by bill reason so that end users can more clearly see how their payments were applied.

Automated Credit of Paid For Lost Items

An enhancement is planned to add credit policies that will allow sites that enable the credit option to provide a credit amount automatically if a lost item that has been paid for is returned within a library-defined period of days after being paid for. Sites will be able to control whether the entire amount is credited and/or if any processing or overdue fees should remain.

New Fields Added to the User Record

Several new fields have been added to the user record to better track the number of claims returned (current), total number of checkouts (year-to-date), total number of

holds, and total number of holds (year-to-date). These new fields will be used in future features in SirsiDynix Symphony. (UNI-16774)(07/29/08)

Dates

SirsiDynix Symphony now checks to see if the hold pickup falls on a day/date the library is closed. If so, the hold pickup by date will be moved to the next open day/date.

For example, Library A is configured to hold items on the hold shelf for ten days, and the library is closed Saturdays and Sundays. A hold becomes available for pickup at Library A on 12/04/2008. When the system calculates the hold Pickup By date, it will add 10 days to the date hold is available. As a result, the hold pickup by date falls on 12/14/2008 (Sunday) which is a day the library is closed. Since the date falls on a closed date, the system moves the hold pickup by date to next open date, which is 12/15/2008. (UNI-3740)(12/02/08)

New Item Record Fields for Circulation Statistics Reporting

To provide more information about an item's circulation activities, the following new fields were added to the item record. These fields are used for historical and interval statistical reporting of item checkouts and renewals. The new statistical fields now display in the Item Search and Display wizard's search window view pane and on the Circ Info tab of the Call Number/Item tab in the Detailed Display.

- **Historical Checkouts** — This is the total number of checkouts for the item since the item was created. When a title node is selected in the view pane, this is the total number of checkouts for all items linked to this title. This field is not cleared by the Reset Item Counters report.
- **Historical Renewals** — This is the total number of renewals for the item since the item was created. When a title node is selected in the view pane, this is the total number of renewals for all items linked to this title. This field is not cleared

by the Reset Item Counters report.

- **Checkouts to Date** — This is the number of checkouts for this item for a predetermined interval (daily, weekly, monthly). It is the number of checkouts since the field was last cleared by the Reset Item Counters report. When a title node is selected in the item tree, this field indicates the number of checkouts for all items linked to this title for the pre-determined interval.

Note: It is possible that the Reset Item Counters report may have been run so that items for a title may have different Last Cleared Dates. This means that the title summary numbers reflect “current” checkouts, not checkouts since a specific Last Cleared Date.

- **Renewals to Date** — This is the number of renewals for this item for a predetermined interval (daily, weekly, monthly). It is the number of checkouts since the field was last cleared by the Reset Item Counters report. When a title node is selected in the item tree, this field indicates the number of renewals for all items linked to this title for the pre-determined interval.

Note: It is possible that the Reset Item Counters report may have been run so that items for a title may have different Last Cleared Dates. This means that the title summary numbers reflect “current” renewals, not renewals since a specific Last Cleared Date.

- **Date Last Cleared** — This is the date the Checkouts to Date and Renewals to Date fields were last cleared by the Reset Item Counters report.

Two new reports were added for gathering interval circulation statistics for items.

- **Item Circulation Count** — This report allows sites to capture item checkout and renewal statistics at specified intervals. This report allows selections by title/call number/item fields, and outputs statistics by library and item type within a library. It is recommended that the report be run on the same date/interval once the library has decided upon a statistical time interval that suits their needs.

Reset Item Counters — This report is used to reset the counters for the interval item statistical fields: Checkouts to Date, Renewals to Date, and Date Last Cleared. Sites run this report after running the Item Circulation Count report. It is recommended that the report be run on the same date/interval once the library has decided upon a statistical time interval that suits their needs.

Completion Dialog Now Appears After Making More Changes

After registering a user, when a library staff member clicks Register New User, a completion dialog box displays. But, if the staff member clicked Make More Changes, and edited the user record, then clicked Modify, no confirmation dialog box displayed. The staff member had no way of knowing whether or not the changes she made to the user record were saved.

Now, if a staff member clicks the Make More Changes button after creating a new user record, then presses ENTER or clicks Modify, a completion dialog box will display. (UNI-13680)